

Employee Post-Travel Disclosure of Travel Expenses

Date/Time Stamp:

Post-Travel Filing Instructions: Complete this form within 30 days of returning from travel. Submit all forms to the **Office of Public Records in 232 Hart Building.**

OFFICE OF THE SENATE

16 NOV 10 PM 1:01

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached:

- ☐ The **original** *Employee Pre-Travel Authorization* (Form RE-1), **AND**
☐ A **copy** of the *Private Sponsor Travel Certification Form* with all attachments (itinerary, invitee list, etc.)

Private Sponsor(s) (list all): The Heritage Foundation

Travel date(s): 10/12/16 - 10/14/16

Name of accompanying family member (if any): N/A

Relationship to Traveler: ☐ Spouse ☐ Child

IF THE COST OF LODGING DID NOT INCREASE DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

Expenses for Employee:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate	\$0	\$196.56	\$118	\$8 - notebook
<input checked="" type="checkbox"/> Actual Amount				\$1 - pen

Expenses for Accompanying Spouse or Dependent Child (if applicable):

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate				
<input type="checkbox"/> Actual Amount				

Provide a description of all meetings and events attended. See Senate Rule 35.2(c)(6). (Attach additional pages if necessary.):

see Agenda Page 1-5

11/10/2016

Matt Shannon

(Date)

(Printed name of traveler)

(Signature of traveler)

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

I have made a determination that the expenses set out above in connections with travel described in the *Employee Pre-Travel Authorization* form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

11/10/2016

(Date)

(Signature of Supervising Senator/Officer)

EMPLOYEE PRE-TRAVEL AUTHORIZATION

Date/Time Stamp:

Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the **Select Committee on Ethics in SH-220**. Incomplete and late travel submissions will **not** be considered or approved. This form **must** be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

Matt Shannon

Name of Traveler: _____

Senator Tom Cotton

Employing Office/Committee: _____

The Heritage Foundation

Private Sponsor(s) (list all): _____

10/12/2016- 10/14/2016

Travel date(s): _____

*Note: If you plan to extend the trip for any reason you **must** notify the Committee.*

Bedford, Pennsylvania

Destination(s): _____

Explain how this trip is specifically connected to the traveler's official or representational duties:

As a legislative correspondent and research assistant handling commerce and economic policy, this retreat will give me the opportunity to refine my policy acumen and cultivate relationships with other Senate staffers to increase my utility to Senator Cotton.

Name of accompanying family member (if any): _____

Relationship to Employee: ☐ Spouse ☐ Child

I certify that the information contained in this form is true, complete and correct to the best of my knowledge:

9/12/2016

(Date)


(Signature of Employee)

TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain):

Senator Tom Cotton

Matt Shannon

I, _____ hereby authorize _____
(Print Senator's/Officer's Name) (Print Traveler's Name)

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. (signify "yes" by checking box) ☐

9/12/2016

(Date)



(Signature of Supervising Senator/Officer)

Attendee List

Last Name	First Name	Office	Title
Bailey	Jake	Office of Sen. Tom Cotton	Legislative Correspondent
Bathon	Mary	Office of Sen. Mike Lee	Legislative Correspondent
Carr	Kerrie	Office of Sen. Jeff Sessions	Legislative Correspondent
Chestnut	Annie	Office of Sen. Ron Johnson	Legislative Correspondent
DiPlacido	Mark	Office of Sen. Ben Sasse	Research Associate
Harst	Lisa	Office of Sen. Tom Cotton	Junior Legislative Assistant
Orr	Caleb	Office of Sen. Marco Rubio	Legislative Assistant
Shannon	Matt	Office of Sen. Tom Cotton	Legislative Correspondant
Smith	Robby	Office of Sen. Mike Lee	Legislative Correspondent for Defense and Foreign Relations
Truluck	Sutton	Office of Sen. Marco Rubio	Legislative Correspondent
Welborn	Abigail	Office of Sen. Tom Cotton	Legislative Correspondent
Williams	Avery	Office of Sen. John Barrasso	Legislative Correspondent

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PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

1. Sponsor(s) of the trip (please list all sponsors): The Heritage Foundation
2. Description of the trip: An educational retreat for conservative Congressional staff which will focus on legislative issues.
3. Dates of travel: 10/12/16-10/14/16
4. Place of travel: Bedford, PA
5. Name and title of Senate invitees: See attached
6. I *certify* that the trip fits one of the following categories:
 - ☒ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal and do not retain or employ registered lobbyists or agents of a foreign principal and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.
OR
 - ☐ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (*see question 9*).
7. ☒ I *certify* that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
AND
 - ☒ I *certify* that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
8. I *certify* that:
 - ☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.
AND
 - ☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).

9. **USE ONLY IF YOU CHECKED QUESTION 6(B)**

I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

– OR –

☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (*see questions 6 and 10*).

– OR –

☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. **USE ONLY IF YOU CHECKED QUESTION 9(B)**

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

The Heritage Foundation is the sole sponsor of the trip and is solely responsible for the execution of it.

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

The Heritage Foundation (Heritage) is a research and educational institution whose mission is to formulate and promote conservative public policies. This retreat is part of that educational mission.

14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

The Heritage Foundation has hosted a House member retreat called the "Conservative Members Retreat" annually for more than a decade. Additionally, Heritage has hosted several staff retreats pursuant to educational fellowships.

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15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

The Heritage Foundation hosts nearly 500 educational events on Capitol Hill each year. These include educational fellowships, topical briefings, and working groups.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="" type="checkbox"/> Good Faith estimate <input type="checkbox"/> Actual Amounts	\$75	\$91/ Night \$182 total	10/12- \$41 10/13- \$51 10/14- \$23 Total - \$115	\$50- Written materials, pens, notebooks

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

The event is arranged specifically with regard to congressional participation.

18. Reason for selecting the location of the event or trip

Bedford Springs is an appropriate distance from Washington to ensure focus on the educational aspect of the trip.

19. Name and location of hotel or other lodging facility:

Omni Bedford Springs

20. Reason(s) for selecting hotel or other lodging facility:

The Omni has excellent facilities for hosting a trip this large and ample meeting space for our purposes.

The inaugural **Emerging Leaders Retreat** will take place in **Bedford Spring, PA, October 12-14**. Promising conservative staff from across Capitol Hill will be joined by conservative policy experts at the top of their field. Attendees will explore the issues facing the next Congress, sharpen their operational skills, and hone in their knowledge of process, rules and procedure. An educational experience tailored to work on Capitol Hill in 2016, this retreat also promises an excellent opportunity to grow your network amongst your colleagues and expand your impact.

**Submit Ethics Travel Forms by Monday, September 12, 2016,
and RSVP online at Events.Heritage.org/Leaders2016**

Buses will depart by 12:00 p.m. for the Omni Bedford Springs.

Buses will depart the Omni by 1:00 p.m. and return to The Heritage Foundation by 4:00 p.m.

For travel and logistics questions, please contact Tommy Binion at (202) 608-6188 or thomas.binion@heritage.org.

 heritage.org



Emerging Leaders 2016 Retreat

Wednesday, October 12 – Friday, October 14, 2016

Omni Bedford Springs | Bedford, Pennsylvania

AGENDA

WEDNESDAY, OCTOBER 12, 2016

11:30 - 12:00 p.m.

Attendee Check-In

Attendees leave luggage at the bus after check-in
Boxed lunches provided on board the bus

The Heritage Foundation
214 Massachusetts Ave., NE

12:00 p.m.

Attendees board the bus

12:15 p.m.

Buses depart to Omni Bedford Springs

3:15 p.m.

Buses arrive at Omni Bedford Springs

3:30 – 5:30 p.m.

REGISTRATION

Attendees check-in to overnight rooms

Omni Bedford Springs

5:30 – 6:30 p.m.

WELCOME AND RETREAT OVERVIEW

Front Lawn

Gerren McHam

*Congressional Fellowship and Outreach Program Manager,
The Heritage Foundation*

Genevieve Wood

*Senior Fellow in Communications, The Heritage Foundation
and Senior Contributor, The Daily Signal*

6:30 – 8:30 p.m.

OPENING DINNER

Reagan Room, Ground Floor

Steve Moore

Distinguished Visiting Fellow, The Heritage Foundation

8:30 – 9:30 p.m.

EVENING CAMPFIRE DISCUSSION ON LEGENDARY STORIES OF AMERICAN LEADERS

Front Lawn

James Swanson

Senior Research Scholar, The Heritage Foundation
Author of New York Times Best Seller,
Manhunt: The 12-Day Chase for Lincoln's Killer

THURSDAY, OCTOBER 13, 2016

- 9:00 – 10:30 a.m. **BREAKFAST ADDRESS** *Colonnade Ballroom, 1st Floor*
Keynote and Q&A will focus on the skillsets and attributes necessary to establish yourself as a leader and someone others will follow. It will also spotlight practical examples that congressional staffers can relate to and highlight the importance of courage during adverse situations.
- Jim DeMint, *President, The Heritage Foundation*
- 10:30 – 10:45 a.m. **BREAK**
- 10:45 a.m. – 12:00 p.m. **EMERGING ISSUE #1:** *Colonnade Ballroom, 1st Floor*
COUNTERING ISLAMIC TERRORISM
The United States is facing what is arguably the most concentrated period of terrorist activity in the homeland since 9/11. The perpetrators are primarily a makeup of those supportive or have pledged allegiance to ISIS. As ISIS continues soliciting support for its radical cause within our borders and around the world, the United States must strengthen its counterterrorism readiness.
- Daveed Gartenstein-Ross
Senior Fellow, Foundation for Defense of Democracies
- Alex Hitchens
Head of Research, International Centre for the Study of Radicalisation and Political Violence
- Robin Simcox (*Moderator*)
Margaret Thatcher Fellow, The Heritage Foundation
- 12:00 – 12:15 p.m. **BREAK**
- 12:15 – 2:00 p.m. **LUNCHEON AND** *Eisenhower Ballroom, 2nd Floor*
EMERGING ISSUE #2: COLLUSION V. CONFLICT
Through acts of fiscal malpractice, the United States is over \$19 trillion in debt—and that figure is rapidly climbing. However, we didn't arrive at this point overnight... Rather than embracing conflict and holding to fiscal sanity, a perpetual "go along to get along" mentality has led the country to financial instability. We must stem the tide before it's too late.
- Paul Winfree
Director, Thomas A. Roe Institute for Economic Policy Studies and Richard F. Aster Fellow The Heritage Foundation
- 2:00 – 2:15 p.m. **BREAK**

THURSDAY, OCTOBER 13, 2016 (CONT.)

2:15 – 3:15 p.m.	EMERGING ISSUE #3: SEEKING SAFETY IN THE CYBER WORLD <i>Almost everything in our society revolves around a digital platform. But through our major technological advances come vulnerabilities that place the security of our nation at risk. How are we to address cybersecurity, internet privacy versus information sharing and privacy in our country? In addition, there are those advocating for the United States to surrender its oversight of the internet, leaving many to wonder how such a transition will impact the nation.</i>	<i>Colonnade Ballroom, 1st Floor</i>
	Steve Bucci <i>Visiting Fellow, Defense Center, Allison Center, and Truluck Leadership Center The Heritage Foundation</i>	
	Berin Szoka <i>President and Founder, TechFreedom</i>	
	Genevieve Wood (Moderator) <i>Senior Fellow in Communications, The Heritage Foundation and Senior Contributor, The Daily Signal</i>	
3:15 – 3:30 p.m.	BREAK	
3:30 – 4:30 p.m.	EMERGING ISSUE #4: THE ECONOMICS OF ENERGY AND CLIMATE SCIENCE <i>Most Americans want low cost energy, while maintaining a healthy environment. However, people take energy for granted without any appreciation for the work it takes to produce this resource. Now "protecting" the environment has become synonymous with the 'climate change' debate, ignoring how these two facets interact with market forces.</i>	<i>Colonnade Ballroom, 1st Floor</i>
	Nicolas Loris <i>Herbert and Joyce Morgan Research Fellow in Energy and Environmental Policy The Heritage Foundation</i>	
	Rachel Bovard <i>Director, Policy Services, The Heritage Foundation</i>	
4:30 – 5:00 p.m.	BREAK	
5:00 – 6:00 p.m.	EMERGING ISSUE #5: SUPREME COURT PREVIEW <i>Important cases await the Supreme Court when they return in the fall. With only eight justices, the balance of the judicial branch is in jeopardy, leaving many to deliberate on the various outcomes conservatives may encounter leading into 2017. This session will discuss actual cases with wit to be decided by the Supreme Court.</i>	<i>Colonnade Ballroom, 1st Floor</i>
	Hans von Spakovsky <i>Manager, Election Law Reform Initiative and Senior Legal Fellow The Heritage Foundation</i>	

THURSDAY, OCTOBER 13, 2016 (CONT.)

6:00 – 7:00 p.m. **BREAK AND OPTIONAL DISCUSSION**

7:00 – 9:00 p.m. **DINNER & KEYNOTE ADDRESS**

*The Mill, across the street
from hotel*

Address: J.V. Venable

Senior Research Fellow for Defense Policy, The Heritage Foundation

Former U.S. Air Force Thunderbirds' Commander

9:00 p.m. **EVENING NETWORKING AND DISCUSSION**

FRIDAY, OCTOBER 14, 2016

8:30 a.m. **Luggage Drop-off**

Attendees leave their luggage at the Heritage luggage check

*First Ladies' Lounge
(across from Colonnade)*

9:00 – 10:00 a.m.

**BREAKFAST: FINDINGS FROM AMERICAN
PERCEPTIONS INITIATIVE (API) MESSAGE TESTING
ON KEY ISSUES FACING CONGRESS**

Colonnade Ballroom, 1st Floor

Dee Allsop

Managing Partner, Heart+Mind Strategies

Genevieve Wood (Moderator)

*Senior Fellow in Communications, The Heritage Foundation
and Senior Contributor, The Daily Signal*

10:00 – 10:15 a.m.

BREAK

10:15 – 11:15 a.m.

**ADDRESSING THE ISSUES AND
ADVANCING THE BALL IN THE 115TH**

Colonnade Ballroom, 1st Floor

Ed Corrigan

Group Vice President for Policy Promotion, The Heritage Foundation

Russ Vought

Vice President of Grassroots Outreach, Heritage Action for America

Tommy Binion (Moderator)

Director, Policy Outreach, The Heritage Foundation

11:15 – 11:30 a.m.

BREAK

FRIDAY, OCTOBER 14, 2016 (CONT.)

11:30 a.m. – 12:30 p.m.	BUILDING A COALITION TO ACHIEVE CONSERVATIVE VICTORIES	<i>Colonnade Ballroom, 1st Floor</i>
	Justin Ouimette <i>Executive Director, House Freedom Caucus</i>	
	Scott Parkinson <i>Executive Director, Republican Study Committee</i>	
	Brittan Specht <i>Policy Director, Republican Study Committee</i>	
	Rachel Bovard <i>Director, Policy Services, The Heritage Foundation</i>	
	Tommy Binion (<i>Moderator</i>) <i>Director, Policy Outreach, The Heritage Foundation</i>	
12:30 p.m. – 1:00 p.m.	CLOSING REMARKS	
1:00 p.m.	CONFERENCE CONCLUDES <i>Attendees board buses; boxed lunches provided on board</i>	
1:00 p.m.	Buses depart the Omni Bedford Springs	
4:00 p.m.	Buses arrive at The Heritage Foundation	

Emerging Leaders 2016 Retreat

Wednesday, October 12 – Friday, October 14, 2016
Omni Bedford Springs | Bedford, Pennsylvania

INVITATION LIST

About the List:

The following individuals were extended an invitation to The Heritage Foundation's Emerging Leaders 2016 Retreat due to their interest in conservative policy making and their status as emerging leaders.

Last Name	First Name	Office	Title
Anthony	Stephen	Senator Tom Cotton	Director of Correspondence
Arias	Jonathan	Senator Marco Rubio	Legislative Aide
Arlantico	Patrick	Senator Ted Cruz	Legislative Correspondent
Asbill	Courtney	Senator Ted Cruz	Legislative Aide
Ayres	Ben	Senator David Perdue	Legislative Correspondent
Bailey	Jake	Senator Tom Cotton	Legislative Correspondent
Bathon	Mary	Senator Mike Lee	Legislative Correspondent
Beckwith	Arian	Senator John Boozman	Legislative Aide
Bishop	Trent	Senator Cory Gardner	Legislative Correspondent
Boh	Patricia	Senator Tom Cotton	Legislative Correspondent
Call	Kelsey	Senator Mike Lee	Staff Assistant
Carr	Kerrie	Senator Jeff Sessions	Legislative Correspondent
Cato	Sierra	Senator David Vitter	Staff Assistant
Chestnut	Annie	Senator Ron Johnson	Legislative Correspondent
Clowser	Jessica	Senator Deb Fischer	Legislative Aide
Craig	Parker	Senator David Perdue	Staff Assistant
Daily	Marjorie	Senator Dan Coats	Legislative Correspondent
DiPlacido	Mark	Senator Ben Sasse	Research Associate

Ditch	David	Senate Budget Committee	Analyst
Farris	Adam	Senator James Lankford	Legislative Aide
Finer	Jonathan	Senator Cory Gardner	Staff Assistant
Flowers	Darien	Senator Bill Cassidy	Legislative Aide
Flynn	Matthew	Senator Thom Tillis	Legislative Correspondent
Foster	Steven	Senator Steve Daines	Legislative Correspondent
Graham	Joel	Senator David Perdue	Correspondence Manager
Hancock	Lauren	Senator David Perdue	Legislative Correspondent
Harst	Lisa	Senator Tom Cotton	Junior Legislative Assistant
Hunter	Kate	Senator Tim Scott	Legislative Correspondent
Jackson	Tionne	Senator Tim Scott	Legislative Correspondent
Johnson	Mac	Senator James Lankford	Legislative Correspondent
King	Jake	Senator James Inhofe	Staff Assistant
Kinkoff	Richard	Senator Marco Rubio	Correspondence Manager
Lauterbach	Jennifer	Senator Bill Cassidy	Deputy Scheduler/Legislative Correspondent
Lavery	Emily	Senator Tim Scott	Legislative Correspondent
Leavitt	Elise	Senator Mike Lee	Staff Assistant
Ledbetter	Rachel	Senator David Vitter	Press Assistant
Lewis	Katherine	Senator Rand Paul	Legislative Correspondent
Mahan	Jesse	Senator James Lankford	Legislative Correspondent
Mathis	Jenna	Senator Ron Johnson	legislative correspondent
McCabe	Katie	Senator David Perdue	Legislative Correspondent
McCullough	Noah	Senator John Cornyn	Policy Assistant
Miller	Andrew	Senator Ted Cruz	Special Assistant
Mulkin	Elliott	Senator Ted Cruz	Legislative Correspondent
Murrey	Ben	Senator Ted Cruz	Legislative Correspondent

Nies	Matt	Senator John Hoeven	Staff and Communication Assistant
Oberan	Elizabeth	Senator Mike Lee	Counsel
Orr	Caleb	Senator Marco Rubio	Legislative Correspondent
Parma	Rebecca	Senator Ted Cruz	Staff Assistant
Patino	Linda	Senator Mike Lee	Scheduler
Pickell	Lindsay	Senator Jeff Sessions	Defense Legislative Correspondent
Pierce	Rob	Senator Rob Portman	Press Assistant
Poulos	Bethany	Senator Marco Rubio	Legislative Correspondent
Poulous	Bethany	Senator Marco Rubio	Legislative Aide
Rendon	Alex	Senator Cory Gardner	Legislative Correspondent
Reuss	Andy	Senator Mike Lee	Legislative Correspondent
Roberts	Quin	Senator Ben Sasse	Legislative Correspondent
Robinson	Erinn	Senator Marco Rubio	Press Assistant
Sacasa	Ted	Senator Marco Rubio	Legislative Aide
Schatz	Sarah	Senator David Perdue	Legislative Correspondent
Schauer	Grant	Senator Ted Cruz	Staff Assistant
Shannon	Matt	Senator Tom Cotton	Legislative Correspondent
Shipley	Matt	Senator Ted Cruz	Military Legislative Aide
Sizemore	Joshua	Senator Daines	Staff Assistant
Smith	Robby	Senator Mike Lee	Legislative Correspondent
Sobolik	Michael	Senator Ted Cruz	Legislative Correspondent
Soncrant	Jared	Senator Cory Gardner	Legislative Correspondent
Strickland	Katie	Senator David Perdue	Staff Assistant
Trimble	Grace	Senator Rand Paul	Legislative Correspondent
Truluck	Sutton	Senator Marco Rubio	Legislative Correspondent
Urlick	Sydnee	Senator Steve Daines	Staff Assistant
Valanos	Eleni	Senator Marco Rubio	Legislative Correspondent
Verzal	Mariah	Senator Ron Johnson	Staff Assistant

Welborn	Abigail	Senator Tom Cotton	Legislative Correspondent
Wellum	Joel	Senator Ben Sasse	Legislative Correspondent
Wenk	Braxton	Senator James Lankford	Staff Assistant
Wheeler	Jillian	Senator Mike Lee	Correspondence Coordinator
Williams	Avery	Senator John Barrasso	Legislative Correspondent
Wolfe	Logan	Senator Rand Paul	Legislative Correspondent
Wolfe	Kaity	Senator Grassley	Director of Correspondence

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PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

1. Sponsor(s) of the trip (please list all sponsors): The Heritage Foundation
2. Description of the trip: An educational retreat for conservative Congressional staff which will focus on legislative issues.
3. Dates of travel: 10/12/16-10/14/16
4. Place of travel: Bedford Springs, PA
5. Name and title of Senate invitees: See Attached
6. I *certify* that the trip fits one of the following categories:
 - ☒ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal and do not retain or employ registered lobbyists or agents of a foreign principal and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.
 - OR -
 - ☐ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (*see question 9*).
7. ☒ I *certify* that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
 - AND -
 - ☒ I *certify* that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
8. I *certify* that:
 - ☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.
 - AND -
 - ☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).

9. **USE ONLY IF YOU CHECKED QUESTION 6(B)**

I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

- ☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

– OR –

- ☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (*see questions 6 and 10*).

– OR –

- ☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. **USE ONLY IF YOU CHECKED QUESTION 9(B)**

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

The Heritage Foundation is the sole sponsor of the trip and is solely responsible for the execution of it.

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

The Heritage Foundation (Heritage) is a research and educational institution whose mission is to formulate and promote conservative public policies. This retreat is part of that educational mission.

14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

The Heritage Foundation has hosted a House member retreat called the "Conservative Members Retreat" annually for more than a decade. Additionally, Heritage has hosted several staff retreats pursuant to educational fellowships.

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15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

The Heritage Foundation hosts nearly 500 educational events on Capitol Hill each year. These include educational fellowships, topical briefings, and working groups.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="" type="checkbox"/> Good Faith estimate <input type="checkbox"/> Actual Amounts	\$75	\$91/ Night \$182 total	10/12- \$41 10/13- \$51 10/14- \$23 Total - \$115	\$50- Written materials, pens, notebooks

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

The event is arranged specifically with regard to congressional participation.

18. Reason for selecting the location of the event or trip

Bedford Springs is an appropriate distance from Washington to ensure focus on the educational aspect of the trip.

19. Name and location of hotel or other lodging facility:

Omni Bedford Springs

20. Reason(s) for selecting hotel or other lodging facility:

The Omni has excellent facilities for hosting a trip this large and ample meeting space for our purposes.

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

The daily expenses meet the federal per diem rate.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

Attendees will travel in a charter bus.

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

25. I hereby *certify* that the information contained herein is true, complete and correct. (You must include the completed signature block below for each travel sponsor.):

Signature of Travel Sponsor:

Ed Corrigan

Name and Title: Ed Corrigan, Group Vice President

Name of Organization: The Heritage Foundation

Address: 214 Massachusettes Ave Washington DC 20002

Telephone Number: 202-546-4400

Fax Number:

E-mail Address: ed.corrigan@heritage.org

PLEASE JOIN US!

PLEASE JOIN US!

The inaugural **Emerging Leaders Retreat** will take place in **Bedford Spring, PA, October 12-14**. Promising conservative staff from across Capitol Hill will be joined by conservative policy experts at the top of their field. Attendees will explore the issues facing the next Congress, sharpen their operational skills, and hone in their knowledge of process, rules and procedure. An educational experience tailored to work on Capitol Hill in 2016, this retreat also promises an excellent opportunity to grow your network amongst your colleagues and expand your impact.

TO REGISTER FOR THIS EVENT, PLEASE:

**Submit Ethics Travel Forms by Monday, September 12, 2016,
and RSVP online at Events.Heritage.org/Leaders2016**

Transportation

Wednesday, October 12

Please arrive to The Heritage Foundation by 11:45 a.m.

Buses will depart by 12:00 p.m. for the Omni Bedford Springs.

Friday, October 14

Buses will depart the Omni by 1:00 p.m. and return to

The Heritage Foundation by 4:00 p.m.

Questions

For travel and logistics questions, please contact Tommy Binion at (202) 608-6188 or thomas.binion@heritage.org.

 heritage.org

Emerging Leaders 2016 Retreat

Wednesday, October 12 – Friday, October 14, 2016

Omni Bedford Springs | Bedford, Pennsylvania

AGENDA

WEDNESDAY, OCTOBER 12, 2016

11:30 – 12:00 p.m.	Attendee Check-In <i>Attendees leave luggage at the bus after check-in</i> <i>Boxed lunches provided</i>	<i>The Heritage Foundation</i> <i>214 Massachusetts, Ave. NE</i>
12:00 p.m.	Attendees board the bus	
12:15 p.m.	Buses depart to Omni Bedford Springs	
3:15 p.m.	Buses arrive at Omni Bedford Springs	
3:30 – 5:30 p.m.	REGISTRATION <i>Attendees check-in to overnight rooms</i>	<i>Omni Bedford Springs</i>
5:30 – 6:30 p.m.	WELCOME AND RETREAT OVERVIEW <i>Welcome: TBD</i>	
6:30 – 9:00 p.m.	OPENING DINNER <i>Keynote Address: TBD</i> <i>Evening keynote and Q&A will focus on the skillsets and attributes necessary to establish yourself as a leader and someone others will follow. It will also spotlight practical examples that congressional staffers can relate to and highlight the importance of courage during adverse situations.</i>	

THURSDAY, OCTOBER 13, 2016

9:00 – 10:30 a.m.	BREAKFAST <i>Topic: The Challenges to Come</i>
10:30 – 10:45 a.m.	BREAK
10:45 a.m. – 12:00 p.m.	EMERGING ISSUE #1: COUNTERING ISLAMIC TERRORISM <i>The United States is facing what is arguably the most concentrated period of terrorist activity in the homeland since 9/11. The perpetrators are primarily a makeup of those supportive or have pledged allegiance to ISIS. As ISIS continues working to solicit support for his radical cause within our borders and around the world, the United States must strengthen its counterterrorism readiness.</i>
12:00 – 12:15 p.m.	BREAK

12:15 – 2:00 p.m.	EMERGING ISSUE #2: COLLUSION V. CONFLICT <i>Through acts of fiscal malpractice, the United States is over \$19 trillion in debt—and that figure is rapidly climbing. However, we didn't arrive at this point overnight... Rather than embracing conflict and holding to fiscal sanity, a perpetual "go along to get along" mentality has led the country to financial instability. We must stem the tide before it's too late.</i>
2:00 – 2:15 p.m.	BREAK
2:15 – 3:15 p.m.	EMERGING ISSUE #3: CRISIS AT THE SOUTHERN BORDER <i>Unaccompanied minors crossing the southern border is up more than 70 percent this year. Along with this troubling statistic is our inability to monitor the southern border—presenting a grave security threat. Before discussions of any migration reforms can take place, we must address the humanitarian and security situation at our front door.</i>
3:15 – 3:30 p.m.	BREAK
3:30 – 4:30 p.m.	EMERGING ISSUE #4: THE ECONOMICS OF ENERGY AND CLIMATE SCIENCE <i>Most Americans want low cost energy, while maintaining a healthy environment. However, people take energy for granted without any appreciation for the work it takes to produce this resource. Now "protecting" the environment has become synonymous with the 'climate change' debate, ignoring how these two facets interact with market forces.</i>
4:30 – 5:00 p.m.	BREAK
5:00 – 6:00 p.m.	EMERGING ISSUE #5: SUPREME COURT PREVIEW <i>Important cases await the Supreme Court when they return in the fall. With only eight justices, the balance of the judicial branch is in jeopardy, leaving many to deliberate on the various outcomes conservatives may encounter leading into 2017. This session will discuss actual cases with wit to be decided by the Supreme Court.</i>
6:00 – 7:00 p.m.	BREAK AND OPTIONAL DISCUSSION
7:00 – 9:00 p.m.	DINNER KEYNOTE OR WORKING DINNER Featuring: TBD Speaker
9:00 p.m.	EVENING NETWORKING AND DISCUSSION

FRIDAY, OCTOBER 14, 2016

8:30 a.m.	Luggage Drop-off <i>Attendees leave their luggage at the Heritage luggage check</i>
9:00 – 10:00 a.m.	BREAKFAST Address: Jim DeMint <i>President, The Heritage Foundation</i>
10:00 – 10:15 a.m.	BREAK

- 10:15 – 11:15 a.m. **ADDRESSING THE ISSUES AND ADVANCING THE BALL IN THE 115TH**
Featuring:
Ed Corrigan, Group Vice President for Policy Promotion, The Heritage Foundation
James Wallner, Group Vice President of Research, The Heritage Foundation
Russ Vought, Vice President of Grassroots Outreach, Heritage Action for America
- Moderator:*
Tommy Binion
Director, Policy Outreach, The Heritage Foundation
- 11:15 – 11:30 a.m. **BREAK**
- 11:30 a.m. – 12:30 p.m. **BUILDING A COALITION TO ACHIEVE CONSERVATIVE VICTORIES**
Moderator: Tommy Binion
Director, Policy Outreach, The Heritage Foundation
- 12:30 p.m. – 1:00 p.m. **CLOSING REMARKS**
- 1:00 p.m. **CONFERENCE CONCLUDES**
Attendees board buses; boxed lunches provided on board
- 1:00 p.m. **Buses depart the Omni Bedford Springs**
- 4:00 p.m. **Buses arrive at The Heritage Foundation**

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Emerging Leaders 2016 Retreat

Wednesday, October 12 – Friday, October 14, 2016
Omni Bedford Springs | Bedford, Pennsylvania

INVITATION LIST

About the List:

The following individuals were extended an invitation to The Heritage Foundation's Emerging Leaders 2016 Retreat due to their interest in conservative policy making and their status as emerging leaders.

Last Name	First Name	Office	Title
Anthony	Stephen	Senator Tom Cotton	Director of Correspondence
Arias	Jonathan	Senator Marco Rubio	Legislative Aide
Arlantico	Patrick	Senator Ted Cruz	Legislative Correspondent
Asbill	Courtney	Senator Ted Cruz	Legislative Aide
Ayres	Ben	Senator David Perdue	Legislative Correspondent
Bailey	Jake	Senator Tom Cotton	Legislative Correspondent
Bathon	Mary	Senator Mike Lee	Legislative Correspondent
Beckwith	Arian	Senator John Boozman	Legislative Aide
Bishop	Trent	Senator Cory Gardner	Legislative Correspondent
Boh	Patricia	Senator Tom Cotton	Legislative Correspondent
Call	Kelsey	Senator Mike Lee	Staff Assistant
Carr	Kerrie	Senator Jeff Sessions	Legislative Correspondent
Cato	Sierra	Senator David Vitter	Staff Assistant
Chestnut	Annie	Senator Ron Johnson	Legislative Correspondent
Clowser	Jessica	Senator Deb Fischer	Legislative Aide
Craig	Parker	Senator David Perdue	Staff Assistant
Daily	Marjorie	Senator Dan Coats	Legislative Correspondent
DiPlacido	Mark	Senator Ben Sasse	Research Associate

Ditch	David	Senate Budget Committee	Analyst
Farris	Adam	Senator James Lankford	Legislative Aide
Finer	Jonathan	Senator Cory Gardner	Staff Assistant
Flowers	Darien	Senator Bill Cassidy	Legislative Aide
Flynn	Matthew	Senator Thom Tillis	Legislative Correspondent
Foster	Steven	Senator Steve Daines	Legislative Correspondent
Graham	Joel	Senator David Perdue	Correspondence Manager
Hancock	Lauren	Senator David Perdue	Legislative Correspondent
Harst	Lisa	Senator Tom Cotton	Junior Legislative Assistant
Hunter	Kate	Senator Tim Scott	Legislative Correspondent
Jackson	Tionne	Senator Tim Scott	Legislative Correspondent
Johnson	Mac	Senator James Lankford	Legislative Correspondent
King	Jake	Senator James Inhofe	Staff Assistant
Kinkoff	Richard	Senator Marco Rubio	Correspondence Manager
Lauterbach	Jennifer	Senator Bill Cassidy	Deputy Scheduler/Legislative Correspondent
Lavery	Emily	Senator Tim Scott	Legislative Correspondent
Leavitt	Elise	Senator Mike Lee	Staff Assistant
Ledbetter	Rachel	Senator David Vitter	Press Assistant
Lewis	Katherine	Senator Rand Paul	Legislative Correspondent
Mahan	Jesse	Senator James Lankford	Legislative Correspondent
Mathis	Jenna	Senator Ron Johnson	legislative correspondent
McCabe	Katie	Senator David Perdue	Legislative Correspondent
McCullough	Noah	Senator John Cornyn	Policy Assistant
Miller	Andrew	Senator Ted Cruz	Special Assistant
Mulkin	Elliott	Senator Ted Cruz	Legislative Correspondent
Murrey	Ben	Senator Ted Cruz	Legislative Correspondent

Nies	Matt	Senator John Hoeven	Staff and Communication Assistant
Oberan	Elizabeth	Senator Mike Lee	Counsel
Orr	Caleb	Senator Marco Rubio	Legislative Correspondent
Parma	Rebecca	Senator Ted Cruz	Staff Assistant
Patino	Linda	Senator Mike Lee	Scheduler
Pickell	Lindsay	Senator Jeff Sessions	Defense Legislative Correspondent
Pierce	Rob	Senator Rob Portman	Press Assistant
Poulos	Bethany	Senator Marco Rubio	Legislative Correspondent
Poulous	Bethany	Senator Marco Rubio	Legislative Aide
Rendon	Alex	Senator Cory Gardner	Legislative Correspondent
Reuss	Andy	Senator Mike Lee	Legislative Correspondent
Roberts	Quin	Senator Ben Sasse	Legislative Correspondent
Robinson	Erinn	Senator Marco Rubio	Press Assistant
Sacasa	Ted	Senator Marco Rubio	Legislative Aide
Schatz	Sarah	Senator David Perdue	Legislative Correspondent
Schauer	Grant	Senator Ted Cruz	Staff Assistant
Shannon	Matt	Senator Tom Cotton	Legislative Correspondent
Shipley	Matt	Senator Ted Cruz	Military Legislative Aide
Sizemore	Joshua	Senator Daines	Staff Assistant
Smith	Robby	Senator Mike Lee	Legislative Correspondent
Sobolik	Michael	Senator Ted Cruz	Legislative Correspondent
Soncrant	Jared	Senator Cory Gardner	Legislative Correspondent
Strickland	Katie	Senator David Perdue	Staff Assistant
Trimble	Grace	Senator Rand Paul	Legislative Correspondent
Truluck	Sutton	Senator Marco Rubio	Legislative Correspondent
Urlick	Sydnee	Senator Steve Daines	Staff Assistant
Valanos	Eleni	Senator Marco Rubio	Legislative Correspondent
Verzal	Mariah	Senator Ron Johnson	Staff Assistant

Welborn	Abigail	Senator Tom Cotton	Legislative Correspondent
Wellum	Joel	Senator Ben Sasse	Legislative Correspondent
Wenk	Braxton	Senator James Lankford	Staff Assistant
Wheeler	Jillian	Senator Mike Lee	Correspondence Coordinator
Williams	Avery	Senator John Barrasso	Legislative Correspondent
Wolfe	Logan	Senator Rand Paul	Legislative Correspondent
Wolfe	Kaity	Senator Grassley	Director of Correspondence

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